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ABSTRACT

This report describes the following 1986 Office of Management Studies (OMS) programs and services: (1) the Academic Library Program, which includes the Management Review and Analysis Program, the Public Services Study, the Planning Program for Small Academic Libraries, the Collection Analysis Project, the Leadership Development Program, the Preservation Planning Program, the Academic Library Development Program, and the Organizational Screening Program; (2) Applied Research and Development, which provided such services for members of the Association of Research Libraries (ARL) as the Collaborative Research/Writing Program, Preservation Planning Studies, the Institute on Research Libraries for Library School Faculty, the North American Collections Inventory Project, and the Canadian Collection Inventories Plan; (3) the Systems and Procedures Exchange Center (SPEC), including SPEC kits, SPEC surveys, the Automation Inventory of Research Libraries, and the Automation Expenditures Report; (4) the Training and Staff Development Program, which provided various management skills institutes and special focus workshops; and (5) the Consultant Training Program. Also included are highlights of OMS activities in 1986; OMS priorities for 1987; brief biographies of OMS staff members; a listing of Academic Library Program participants from 1973 to 1986; a list of articles and presentations by OMS staff; a list of OMS publications; an OMS publications price list/order form; a schedule of services and prices for 1986-87; and a brief financial statement. (KM)

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OMS

1986
Annual Report

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Table of Contents

Introduction 2

The Office of Management Studies—Background 4

Association of Research Libraries' Committee on the Management of Research Library Resources 4

Brief Summary of Activities in 1986 5

Academic Library Program 6

Applied Research and Development 8
- Collaborative Research/Writing
- Preservation Planning
- Institute on Research Libraries for Library School Faculty
- North American Collections Inventory Project
- Canadian Collection Inventories Plan

Systems and Procedures Exchange Center 14
- SPEC Kits
- SPEC Surveys
- Automation Inventory
- Automation Expenditures Report

Training and Staff Development Program 18
- Basic Management Skills Institute
- Advanced Management Skills Institute
- Library Analytical Skills Institute
- Special Focus Workshops and Presentations

Consultant Training Program 22

Priorities for 1987 32

OMS Staff 34

Academic Library Program Participants List 36

Articles and Presentations by OMS Staff 38

OMS Publications 39

OMS Publications Price List/Order Form 45

Schedule of OMS Services and Prices 1986-87 47

1986 Financial Information 49

Introduction

In a useful new management book entitled "The Transformational Leader", Noel Tichy and Mary Anne Devanna argue the importance of strategically preparing for the future. The essence of this preparation is recognizing the need for revitalization, creating a new vision, and institutionalizing the changes. The ARL Office of Management Studies (OMS) provides the methods, information, and training to help leaders realize these essential elements in research libraries.

Thinking and planning strategically is a well known avenue for success for academic research libraries. Anticipating and influencing prospective developments are natural competencies of successful and durable library leaders. The distinctive aspect of today's strategic planning is orchestrating the processes for involving significant constituencies in thinking imaginatively about the future of the research library.

The OMS provides support for these strategic efforts. This support comes in part through the inculcation of a management philosophy centered around involving people in decision-making and developmental efforts. Such involvement can lead to better judgements and greater commitment to the resulting policies and programs. It also contributes to a more active and able staff.

The Office also provides support by making available methods and techniques for studying issues, collecting and distributing information on changing operational practices, and enhancing the personal skills of the staff comprising research libraries today. These methods and techniques are used by a variety of research libraries whose leaders display a range of management philoshopies and expectations for the future.

In 1986, the use of OMS planning and developmental services by diverse institutions preparing for unique futures was well illustrated in the new Leadership Development Program. This program, developed orginally with the Yale University Libraries, is a strategic planning process involving twenty to thirty senior library managers. The program is comprised of a three-day retreat. At this retreat, line administrators examine historical factors shaping the library; major external forces that are serving to change the environment and the technology that are central to the future of libraries; and alternative projections of the next ten years of research library services, programs and relationships with users. One product of these discussions is a two-page description of a "vision" for library growth and development. In addition, priority areas for short-range attention are identified and ideas for acting in these areas are prepared.

During 1986, three libraries, Ohio State University, University of Southern California, and State University of New York/Buffalo, applied this process to their situations. On occasion, university administrators joined groups to share their estimates of university issues and expectations of environmental changes. In some instances, documents were drafted for subsequent review and refinement. In other settings, intervals were scheduled between the preparation of the "vision" statement and the development of key result areas.

While the process and the products vary from one library to the next, each of the Leadership Development Programs was characterized by active involvement of line managers in thinking about the future from a strategic point of view. All programs result in documents that can serve to communicate to and influence other constituencies. And all programs include facilitation and training assistance provided by the OMS staff.

Further applications and interpretations of this planning assistance are expected in 1987. Several libraries will use OMS expertise in designing a planning process. Other libraries want more of a traditional consulting arrangement where advice on programmatic concerns is provided by OMS staff. The use of the self-study technique is preferred by those libraries seeking more intensive analysis of program concerns and the extensive involvement of representative staff in the improvement process. The success of these planning efforts hinge on the readiness and response of people in research libraries. The OMS staff, in turn, are continually adjusting established services and adding new capabilities in order to meet the contemporary realities of research libraries.

Effective planning also requires up to date information. In the information clearinghouse services provided by the OMS Systems and Procedures Exchange Center, for example, 1986 was a year of active investigation of current issues affecting research libraries. Ten SPEC Flyers and Kits were produced covering topics such as: bibliographic instruction, microcomputer software policies, barcoding of collections, and automated library systems. These topics were studied by staff from research libraries working with OMS staff and generally encompased surveys of operating practices in ARL members. In addition, SPEC staff conducted eleven on-demand investigations sponsored by member libraries.

Planning and development processes require sophisticated and highly skilled staff. The OMS training program responds to these changing member needs in this regard. In addition to conducting eight public institutes covering basic, advanced, and analytical skills for research library managers, office staff conducted ten sponsored institutes. The OMS staff also designed a new training program aimed at the specific interests of assistant and associated library directors. Each of these institutes is conducted by an OMS staff member working with select staff from research libraries serving as co-trainers, further enhancing the experience and skills of available research library managers.

Some authorities predict an electronic future for research libraries. Other experts suggest that new structures and agencies will supplant research libraries. And still others urge caution in predicting radical shifts in the traditional scholarly modes of behavior and the institutions that serve those needs. These predictions hold little significance, howvever, unless they are translated to specific library situations. Understanding future prospects for the individual research library and the implications of current decisions on shaping this future is the challenge facing library leadership.

While the established OMS programs are responding to current needs and interests of ARL members, there is also a need to consider new intitiatives that may be useful in the future. Monitoring the changing interests and needs of ARL member libraries in the management arena is a principal responsibility of the ARL Committee on the Management of Research Library Resources. This committee works closely with the OMS staff and determines the OMS priorities for developmental efforts. These priorities include developing a library-based management information system, a financial management skills institute, a technology adaptation process, and a managing the learning process institute.

This was an active and exciting year for the OMS. Further evidence of the readiness of research libraries to embark on a transformation process was abundant. The established OMS programs were enhanced and adapted to member interests. New activities were started. This ongoing work described in the annual report, reflects a continuing goal of the Office of Management Studies: to help research libraries enhance their performance through improved management.

—Duane E. Webster

The Office of Management Studies

The Office of Management Studies (OMS) was established in 1970 to help research and academic libraries develop better ways of managing their human and material resources, and to work with them in determining how best to meet the needs of their clientele in a dramatically changing information age. To achieve these ends, OMS provides training for library managers and staff members; offers consultation and assisted self-study services; and publishes a wide range of materials for administrators focusing on management techniques, the introduction of new technology, and staff development.

Established with support from the Council on Library Resources, OMS has received funding from a variety of sources since 1970. These include The Association of Research Libraries, Council on Library Resources, Andrew W. Mellon Foundation, General Electric Foundation, National Endowment for the Humanities, Lilly Endowment, Inc. and H.W. Wilson Foundation. Ongoing services and publications are supported by user fees. Guidance is provided by the Association of Research Libraries' Committee on the Management of Research Library Resources and other project-related advisory groups.

Current, practical issues of library operations and management are the foundation of ongoing OMS activities. Collection management, preservation, technology application, and public services development are among the service areas OMS has developed to assist libraries in maintaining their roles as information centers for higher education and the scholarly community and as preservers of the nation's heritage.

ARL Committee on the Management of Research Library Resources

The Association of Research Libraries' Committee on the Management of Research Libraries oversees the planning and implementation of personnel, staffing and management objectives of the ARL Plan of Action. It coordinates ARL's efforts to provide the analytical capabilities required for member libraries to effectively manage their resources. To accomplish this coordination, the Chair of the Committee on ARL Statistics serves ex-officio as a member of the committee. In particular, the Committee on Management:

—monitors research in management-related areas and identifies problems, issues, and opportunities facing research libraries that should be addressed through the application of management methods and/or quantitative analyses, and makes recommendations to the ARL Board on policies, programs and positions;

—relates the work of ARL standing committees and task forces in the areas of statistical information and organizational and staff development to the overall needs in management, and keeps the committees and task forces informed of each other's work;

—oversees and advises on the work of the ARL Office of Management Studies; specifically assists in the development of management programs and activities to meet the needs of ARL member libraries and in securing the financial resources needed to support these activities; assesses OMS performance in achieving its goals and the effectiveness of its programs; and recommends OMS policy and program priorities to the ARL Board;

—coordinates, where appropriate, ARL's work in the area of management with that of other national organziations and ensures, with the approval of the Board, that necessary liaisons between these organizations and ARL standing committees are in place.

Committee Members

Joan Chambers, Chair (1986)
Director, Colorado State Library

Ellen Hoffman (1987)
Director, York University Libraries

Herbert F. Johnson (ex officio as Chair of Committee on ARL Statistics)
Director, Emory University Library

Sul H. Lee (1986)
Dean, University Libraries, University of Oklahoma

Philip E. Leinbach (1988)
Librarian, Tulane University

Jay K. Lucker (1987)
Library Director, Massachusetts Institute of Technology

Susan K. Martin (19867)
Librarian, Johns Hopkins University

Carlton C. Rochell (1988)
Dean, University Libraries, New York University

Brief Summary of Activities in 1986

During 1986, the Office of Management Studies was fully staffed, programs operated at a high level of participation, five separately-funded projects were operated, and evaluations by participants in training and development programs were uniformly positive. Highlights of yearly activities include:

Three major, separately-funded projects were undertaken this year:

—Phase III of the North American Collections Inventory Project (NCIP) sponsored by the Andrew Mellon Foundation;

—the second Institute on Research Libraries for Library School Faculty, sponsored by the Council on Library Resources;

—and the final year of the Preservation Planning Program Deomonstration Studies, funded by the National Endowment for the Humanities.

Two smaller projects, also separately funded, were undertaken as well:

—an update of the Preservation Planning Program study manual and resourcenotebook, funded by the National Endowment for the Humanities;

—and a collaborative effort with the Lister Hill Center to gain better information on automation expenditures by research libraries. OMS coordinated eleven library-based self-studies as part of the Academic Library Program. These included two collection studies, five public services studies, one Academic Library Development Program study, two preservation studies and one small library planning study. In addition, the ten self-studies comprising the NEH-funded Preservation Planning Program were completed.

The Systems and Procedures Exchange Center issued ten SPEC Flyers and Kits. Topics covered organization charts, systems offices, interlibrary loan, automated library systems, technical services cost studies, barcoding of collections, microcomputer software policies, end-user searching services, bibliographic instruction, and exhibits. Over 400 SPEC subscriptions were maintained and over 7000 SPEC Kits were distributed.

Working with the Yale University Library staff, OMS designed a new Leadership Development Program which was adapted to the needs of three member libraries: Ohio State University, The State University of New York at Buffalo, and the University of Southern California. This program is now part of the ongoing Academic Library Program.

The training staff conducted six public and eight sponsored management institutes. Seventeen special focus workshops and presentations were completed and a new Management Institute for Assistant and Associate University Librarians was designed and conducted. Over 300 library staff participated in the management institutes.

In the research and development area, a number of new ideas for services and projects were investigated:

—management literature review service

—financial management skills institute

—managing the learning process institute

—technical services study

—management information services

—study of democgraphic characteristics of library staff

—study of professional staff turnover.

The OMS staff worked with five ARL committees and task forces throughout the year, contributed to the design and conduct of the Fall ARL membership meeting, and assisted in the updating and format revisions for the ARL Strategic Plan.

The OMS Director assumed the role of Deputy Executive Director of the Association of Research Libraries.

Academic Library Program

Historically, libraries have achieved distinction as storehouses of information; their ever-growing collections providing rich and diverse resources for users. Staff efforts focused on building and maintaining collections, and there was an emphasis on self-directed public access.

Today, academic libraries face the fundamental challenge of responding more effectively to the information needs of their users in a period of increased information resources and decreased or stabilized economic resources. Not only has there been a dramatic increase in the amount of resources available to the public, there have also been many changes in what people can and do expect from libraries. Increased competition for public and institutional support has only heightened the challenge.

For over 16 years, OMS has provided libraries with programs to systematically study their internal operations and develop workable plans for improvement. With the assistance of trained consultants, libraries participating in the Academic Library Program use tested methodologies to conduct assisted self-studies. The OMS provides onsite and telephone consultation, staff training, manuals and other materials to aid participants in gathering and analyzing information. These self studies take from three to 12 months to complete, with groups of library staff meeting three to four hours a week, and individuals spending additional hours studying, gathering data and analyzing their findings.
The result—participating libraries gain insight into their current situation and develop workable recommendations for change and improvement. Such assessments have contributed to periodic accreditation efforts, parent institutions' planning processes, the introduction of new services and the resolution of complex organization problems. Libraries often use their final reports to gain support for library needs and to highlight their role in the future of the college or university. Self-studies also improve the analytical and problem-solving skills of staff and build staff motivation. Faculty-library relations are often improved as well because the studies clarify interests, perceptions and expectations.

During 1986, staff at 26 libraries in the United States and Canada worked on 27 self-studies within the Academic Library Program. The following is a list of libraries participating in 1986 and a brief description of each type of self-study. Ongoing projects are listed in capital letters.

The Management Review and Analysis Program:
This program covers planning, budgeting, policy making, management information, supervision and leadership, organization, personnel practices, staff development and executive leadership. It is offered to libraries with 50 or more staff members. Of the 22 participating libraries who participated through 1985, 86 percent were members of the Association of Research Libraries. No MRAP programs were initiated in 1986.

Public Services Study:
Newly-developed in 1984, this program provides a framework for short or long-term strategic planning of public services. In the context of emerging technologies and changing user needs it focuses on: describing and inventorying services; assessing user needs and services performance; examining organization, staffing and management of services; planning for and using new technology; developing facilities requirements; and articulating a public serices program. It has been designed for large and mid-sized research and academic libraries. To date, all of the 13 participants have been members of the Association of Research Libraries.

Boston University
University of California, Santa Barbara
DARTMOUTH COLLEGE
University of Houston
MCGILL UNIVERSITY
YORK UNIVERSITY

Planning Program For Small Academic Libraries:
This program, designed for small libraries with staffs of less than 20, assists participants in the development of plans for instruction and research services. They examine policies, library users, service delivery and management. None of the 23 libraries that selected this program to date have been members of the Association of Research Libraries.

Bloomsburg University

Collection Analysis Project:
This program provides a framework for assessing collection development practices and policies. It includes modules on collection history and description; collection objectives and policies; funding allocations for materials; organization and staffing of collection development functions; collection assessment; preservation and resource sharing. Both large research libraries and academic libraries with smaller collections can benefit from participation in this program. Of the 30 participants to date, 70 percent were members of the Association of Research Libraries.

Oregon State University
Rutgers University

Leadership Development Program:
Established in 1986, this is an exercise in strategic planning geared to senior management staff of large research libraries. It is an opportunity to examine options for the future development and to consider making changes. During a three and one half day retreat, participants consider library options and strategies; evaluate ways to deliver services more effectively given available resources; and discuss possible adjustments in service philosophy and staff values. To date, the program has only been offered to members of the Association of Research Libraries.

Ohio State University
State University of New York, Buffalo
University of Southern California
Yale University

Preservation Planning Program:
Geared to large and mid-sized research and academic libraries, this program helps participants identify current preservation activies and determine priorities. They also assess the potential impact of emerging national developments on internal programs. A manual and resource notebook, which are available to non-participants as well, include investigations of environmental conditions, the condition of collections, the organization and operation of preservation functions, crisis management, and preservation resources. To date, all 17 of the participants have been members of the Association of Research Libraries. (Programs funded under a grant from the National Endowment for the Humanities are marked with an asterisk. For more detail on these programs, consult the section on Applied Research and Development).

*Center for Research Libraries
*Colorado State University
*Iowa State University
*University of Missouri
*Northwestern University
*Ohio State University
PITTSBURGH UNIVERSITY
*University of Oregon
*Smithsonian Institution
*State University of New York, Stony Brook
*University of Tennessee
UNIVERSITY OF WISCONSIN

Academic Library Development Program:
This provides a comprehensive review of all aspects of library programs, and includes sessions on assessing operations, services, management practices, facilities, and changing technological needs. It has been designed for mid-sized libraries with staffs of 20 to 50 people. Of the 12 libraries participating through 1986, 15 percent were members of the Association of Research Libraries.

New Mexico State University

Organizational Screening:
An intensive, active program, this centers around a specific issue such as reorganization design, team-building or planning. It can be used by any size library. Of the ten libraries that have participated in this program, 44 percent were members of the Association of Research Libraries. No Organizational Screening programs were undertaken in 1986.

Collaborative Research/ Writing Program

This program enables librarians to conduct research and prepare publications on specific, library-related issues. OMS staff provide assistance with survey design, data gathering and analysis. The Office then publishes the results as Occasional Papers or SPEC Kits.

Occasional Papers are often the result of indepth investigation and analysis of the issues covered in SPEC Kits, focusing on current practices and proposing alternative systems in specific management areas. In conducting their research, writers locate libraries that have successfully dealt with those issues. A discussion of trends and issues is often included.

Since the Occasional Paper series began in 1971, 11 titles have been produced in such areas as goals and objectives, online bibliographic search services, salary compensation systems, budget allocation, and performance measurement. The most recent paper, published in April, 1986 is "Academic Libraries On The Periphery: How Telecommunications Information Policy Is Determined In Universities," by Kenneth Flower. It looks at developments at 26 universities in the Spring of 1985 in order to identify patterns or models of telecommunications information planning and decision-making. Using responses to a questionnaire, results of telephone interviews, and analysis of organization charts, the author identified the centers of decision-making at selected ARL-member libraries. Then, based on these findings, four models of policy decision-making were identified: academic affairs centered, administrative services centered, computing/information systems centered, and decentralized (including committee-based).

SPEC Kits

Organization Charts	Irene B. Hoadley, Director Texas A & M University Library
Systems Office Organization	R. Bruce Miller, Systems Officer Indiana University Libraries
Interlibrary Loan	Joan S. Howland Associate Director Law Library, School of Law University of California at Berkeley
Automated Library Systems	Arnold Hirshon, Associate Director of Technical Services and Automation, Virginia Commonwealth University
Technical Services Cost Studies	Heidi Lee Hoerman Associate Director, Technical Services, Montana State University Libraries
Barcoding	Gail A. Kennedy Assistant Director Technical Services Michael J. Lach, Jr. Assistant Director Public Services University of Kentucky Libraries
Microcomputer Software Policies	Richard Nollan, Curator Special Collections, University of Pittsburgh Libraries
End-User Searching Services	Sarah E. Thomas, Chief Technical Services Division National Agricultural Library
Bibliographic Instruction	Carol F. Ahmad Assistant Director Public Services, University of Miami
Exhibits	Mary Wyly, Director Library Services The Newberry Library

Occasional Papers

Academic Libraries On The Periphery: How Telecommunications Information Policy Is Determined In Universities	Kenneth Flower, Assistant Director for Administrative Services, Milton S. Eisenhower University

Preservation Planning Program

In 1984, ten libraries were selected to participate in the Preservation Planning Program as part of a two-year demonstration project funded by a $65,375 grant from the National Endowment for the Humanities. During the course of 1986, each library completed its Demonstration Site Study and issued a final report which is available from OMS. (See List of OMS Publications)

To allow for participant evaluation and feedback, directors and study teams were asked to rate the program and comment on the value of specific aspects of the self-study. Both library directors and staff members reported high levels of satisfaction with the way the self-studies were conducted at their institutions.

Participants have already begun implementing the recommendations in their final reports. As a result of their participation in the planning program, various demonstration site libraries have strengthened the administration of their preservation office, implemented disaster plans, developed and implemented policies for handling materials, purchased major equipment, and increased funding for preservation, among other actions.

A supplemental grant of $13,000 was received from NEH in 1986 to design two new modules for the *Preservation Planning Program Manual* and to update the *Preservation Resource Notebook*. The manual describes a planning process and guides a library staff through the steps that lead to an action plan and final report. The two new chapters cover user-staff education and interinstitutional cooperation. The notebook has been updated to reflect the last three years of preservation advances. It provides over 700 pages of articles, procedures, techniques and readings, and is indexed and arranged to assist librarians in learning about and conducting preservation programs.

Both the manual and notebook are available as stand-alone publications from OMS. Several hundred libraries pursuing preservation plans have used the publications over the past three years, and OMS continues to accept applications from libraries wishing consultation assistance in conducting Preservation Planning Programs.

A complete list of PPP participants is included in the section on the Academic Library Program. Those operated under the NEH grant are marked with an asterisk.

Institute on Research Libraries for Library and Information Science Faculty

The preparation of new professionals to work in research libraries has been an ongoing concern for OMS. The Institute on Research Libraries for Library and Information Science Faculty is one approach OMS has taken to create a forum for a meaningful exchange between library administrators and library educators. It has provided an opportunity for the mutual exploration of the dynamic quality of academic research libraries today and the implications of their changing nature for library education.

In 1986, OMS held its second Institute; this one funded by the Council on Library Resources with a grant of $45,857. Twelve participants were selected by the advisory committee in January after a nationwide application process. Individuals undertook a one-week field visit preceding the Institute to a major research library of their choice where they studied various aspects of library programs and processes.

The Institute was held at the Massachusetts Institute of Technology, July 27-August 8. The first week of seminars was devoted to discussions of the participants' experiences during their field visits and to operational issues. A series of dialogues with practitioners then focused on the programmatic concerns of libraries. The seminar sessions covered public services, collection management, technical service operations, preservation, library management and staffing issues.

During the second week of the Institute participants attended briefing sessions designed to integrate the field visits and seminars and to focus on the problems and opportunities facing academic and research libraries. Participants visited Boston Public Library, and the libraries of Boston University, Harvard University and the Massachusetts Institute of Technology to meet with administrators and library staffs. Their discussions covered a range of topics, including the political and organizational context of research libraries, curriculum, research interests and teaching methods of research libraries, the impact of computers and communication technology on higher education and environmental pressures facing research libraries. These institutes are undertaken by OMS in an effort to influence and strengthen the preparation of professionals who wish to work in academic and research libraries. A total of 22 library and information science faculty have now participated. Based on their responses, the program can be regarded as successful in meeting its objectives of examining and exploring the emerging role and requirements of research libraries as a means of changing and improving the way individuals are prepared for careers in research librarianship.

Based on the continued, positive response of participants, the ARL Committee on the Management of Research Library Resources has asked OMS to seek funding for a third Institute in 1987. This effort is viewed as an ongoing investment in the future of academic libraries through the recruitment and improved quality of preparation of professionals.

Advisory Committee

Irene Hoadley
Director, Texas A&M University Chapel Hill, School of Library Science

Edward Holley
Dean Emeritus, University of North Carolina

Margot McBurney
Chief Librarian, Queen's University Library

Charles McClure
Associate Professor, University of Oklahoma, School of Library Science

Ruth Person
Associate Dean, Catholic University, School of Library and Information Science

Ronald Powell
Assistant Professor, University of Michigan, School of Library Science

Robert Stueart
Dean, Simmons College, Graduate School of Library Information and Science

Merrily Taylor
Librarian, Brown University Library

Robert Vosper
Professor, University of California, Los Angeles, Graduate School of Library and Information Science

Herbert White
Dean, Indiana University School of Library and Information Science

North American Collections Inventory Project

For the past three years, OMS has worked with the Research Libraries Group (RLG) to convert its Collection Conspectus program into an inventory of North American Research Library Collections. The long-term vision behind this inventory project focuses on the potential that it has to provide the information for libraries to make important, substantive cooperative decisions regarding collection development, preservation and cataloging. It is viewed as an opportunity for libraries to develop cooperative programs that will allow them to serve their users more effectively. As such, it provides a standard framework for libraries to use in describing their collections.

OMS staff have developed procedures and resources to support use of the RLG Collection Conspectus and tested them in three ARL-member libraries. Efforts have been focused on constructing a data base that provides information on the location of specific subject collections, their relative strengths and coverage. Managed by RLG, this data base is available in both online and print formats.

In June 1984, the Andrew W. Mellon Foundation awarded a $220,000 grant to the Association of Research Libraries to support full-scale implementation of North American Collections Inventory Project (NCIP). The three-year grant supports the selection and preparation of 15 librarians as NCIP trainers; development of a materials distribution center; and the support system needed to coordinate ARL member participation. In addition, OMS project staff is preparing educational materials for librarians and research library users and developing procedures for identifying specialized collections in libraries outside the ARL membership. The project is also investigating and promoting uses of NCIP data for cooperative programs. At the end of the grant period, it is expected that the online inventory of North American research library collections will include data from close to 100 ARL libraries and will provide a foundation for inter-institutional cooperation in acquiring, preserving and providing access to research materials. Over 80 percent of ARL-member libraries are participating or planning to participate in NCIP. During 1986, work on Phase III emphasized the development and operation of training programs for collection development librarians. Activities included three-day workshops in Calgary and Toronto for members of the Canadian Association of Research Libraries (CARL), and a Training the Trainers Workshop for 15 selected librarians in Boston. ARL continues to work with RLG in the development of Conspectus-related tools through its representation on the RLG Task Force on Cospectus Analysis and OMS now serves as the NCIP publications clearinghouse for non-RLG libraries.

NCIP Publications

The first issue of the NCIP News was published in January 1986. Issued several times each year, it will keep members of ARL and CARL as well as other NCIP participants informed about project activities. The newsletter reports changes in conspectus worksheets; announces the availability of new verification studies; addresses issues of importance to the implementation of NCIP; and reports progress in completing the Conspectus. By highlighting efforts in ARL libraries, the newsletter contributes to an enhanced understanding of NCIP, stimulates participation and promotes support for conspectus-related activities.

In October 1986, at the 109th ARL Membership Meeting, "NCIP: Means to an End" was the featured program session. The proceedings from the meeting will be published early in 1987 and a future issue of NCIP News will discuss the program in detail. Papers were given by David Stam, Syracuse University; Robert Miller, University of Notre Dame; Marianne Scott, National Library of Canada; Anthony Ferguson, Columbia University, and Millicent Abell, Yale University.

NCIP Training

Fifteen participants completed the NCIP Trainers Workshop in 1986 which included sessions on collection evaluation techniques, Conspectus requirements, and skills for designing and operating workshops. The project consultants are now available to assist research libraries in planning and organizing Conspectus projects and to instruct staff in the methods used to complete the Conspectus.

In addition, four librarians who have contributed to the development of NCIP also serve as project consultants and have worked with OMS staff on NCIP workshops. They are:

Joseph Branin
Director
Humanities and Social Sciences Libraries
University of Minnesota Libraries

John Clouston
Romance Languages Bibliographies
University of Western Ontario

David Farrell
Associate Dean of Libraries for Collection Management
Indiana University

Patricia Yocum
Head, Natural Science Library
University of Michigan

NCIP Consultants

Ross Atkinson
Assistant University Librarian for Collection Development
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Canada

Canadian Collection Inventories Plan

A National Plan for Collections Inventories has been developed by the Resources Network Committee of the National Library of Canada's Advisory Board. Inventories of general collections were begun using RLG Conspectus methodology adopted by ARL for NCIP. The Canadian Association of Research Libraries is taking the lead in applying that methodology for the development of a Canadian inventory which will eventually include data from non-CARL academic libraries, large public libraries and special libraries throughout Canada. Of the 29 CARL members, 14 belong to ARL as well, and are participating in NCIP.

The OMS has worked with the National Library of Canada in adapting Conspectus materials for Canadian applications and, as mentioned above, designed and held NCIP training workshops for CARL members in 1986 in Calgary and Toronto.

Conspectus data for Canadian libraries will reside in a Canadian inventory of research collections. This data base is being developed by the National Library and will be available nationwide in both official languages. While modelled on RLG's Conspectus On-line, it has several important differences, namely: a fully bilingual capability; Boolean search capability in the notes fields; and simplified searching on LC classification numbers. The system is scheduled to be fully operational in early 1987.

NCIP Materials

The OMS has prepared a new order form for requesting Conspectus worksheets, supplementary guidelines, and verification studies. Conspectus worksheets are now available for all divisions of the Library of Congress classification, except for A,U and V. In addition, the worksheets for Anthropology (GN) and Bibliography and Library Sciences (Z) are in the final review stages.

Worksheets for Women's Studies and African Studies are also in progress. In addition, several Conspectus divisions are under revision, including Art and Architecture; History; Economics and Social Sciences; Political Science; East Asian Studies; and South Asian Studies. Supplementary guidelines have been prepared for a number of Conspectus divisions, and verification studies (comparative collections analyses) are now available from OMS.

16

Systems and Procedures Exchange Center

The Systems and Procedures Exchange Center (SPEC) was established in 1973 to systematically gather, analyze and distribute information and descriptive materials on contemporary management techniques as they are developed by academic libraries. Several times each year, the center conducts surveys for information and documents on topics of current interest. These documents include manuals, policy statements, planning materials, committee reports, job descriptions, procedures, brochures, user studies and results, as well as newsletters and descriptions of innovative techniques. These materials are selected for presentation in SPEC Kits which are issues ten times each year.

In addition, each months the center processes several hundred in information inquiries including file searches, individual surveys and research, and quick-reference telephone queries from ARL members. The center also publishes analytical reviews on management topics, identifies areas of library management expertise, and facilitates the exchange of information in an effort to promote experimentation and innovation based on successful programs at member libraries. in this way, academic, research, special and public libraries may benefit from the activities and research done at other facilities.

On a regular basis, the SPEC coordinator and other OMS staff members identify topics to be investigated during library site visits, interview library administrators and staff to determine information needs, and familiarize members with ways to use SPEC materials and services.

SPEC Kits

The kits are collections of selected documents concerning specific areas of library management. They are prepared by OMS staff and collaborative research/writers—working librarians selected for their experience and knowledge. Criteria for inclusion are: relevance to management or administrative perspectives; timeliness; usefulness to other libraries; direct relationship to the area of concern; and distinctiveness. Designed to illustrate alternatives and innovations used to deal with particular issues, the kits describe both the administrative and operational aspects of one concern per issue. Each kit also includes a selective bibliography and a two-page flyer based on materials submitted by ARL libraries, a review of current literature, and information obtained during site visit interviews. These flyers focus on emerging trends and innovations in areas of immediate interest to academic and research library management and operation. The trends highlighted are the result of in-depth analysis of documents and of survey results. These flyers are designed to provide a quick picture of state-of-the-art activities and developments in the field, and to give perspective to the content of the SPEC kits.

Originally provided only to ARL members, SPEC Kits are now sent to an additional 350 library subscribers. Although many of these libraries are associated with universities or colleges, about 25 percent are public or special libraries. SPEC Kits are now available though library distributors, subscription agents and vendors.

The following is a list of kits published in 1986. A list of back issues is available from the SPEC Center at OMS.

Exhibits, #120, January 1986

There is general agreement regarding the educational and cultural advantages of exhibits in libraries, however research and academic libraries often adopt operating guidelines and procedures to exhibit planning and installation from museums and other non-library institutions. To analyze procedures and policies developed specifically for research libraries, and to gather information on the staffing, administration, and local issues of mounting exhibits, SPEC surveyed the entire ARL membership. Of 117 members, 70 responded and 46 supplied background materials. The kit includes job descriptions, procedures checklists, examples of publicity materials, exhibit policies and proposals.

The flyer covers staffing, goals and themes, exhibit preparation, and local policies for library exhibits.

Bibliographic Instruction, #121, February 1986

Because of changing interests and needs over the past 15 years, the definition of bibliographic instruction, also called library use instruction or user education, has shifted. In the early 1970's these programs tended to concentrate on how to obtain information in a particular library building. Today, the goal is often to teach patrons how to tap into various innovation instructional methods. This kit examines current developments based on a survey of 25 ARL members with active BI microcomputer-based instruction, descriptions of graduate student and international student instruction.

The flyer discusses developing technology, changing audiences, and changing librarian roles as they relate to bibliographic instruction.

End-User Searching, #122, March 1986

As faculty, staff and students begin to access databases directly, librarians are finding new ways of assisting patrons and developing new public services programs. In mid–1985, researchers contacted librarians at 23 U.S. and Canadian universities to determine what end user activities were taking place and the involvement and cooperation of the library. The kit contains information on this survey, a grant proposal, program descriptions, examples of publicity, instructional aids and reference tools, as well as evaluations.

The flyer covers equipment for end user searching, subsidized research, fees, and staff support.

Microcomputer Software Policies, #123, April 1986

As the use of microcomputers increases within research libraries and among their users, so does the necessity for access to more sophisticated and varied software. A survey of 105 academic members determined which libraries were acquiring and circulating microcomputer software and what policy guidelines regulated this library function. This flyer discusses survey cataloging, facilities and services, and relationships with computing facilities.

Barcoding of Collections, #124, May 1986

This is often one of the first critical projects a library will undertake during the process of automation and it has a major impact on staffing and financial resources. This kit addresses the major issues and problems in barcoding by reviewing the experiences of members which have undertaken such projects. The kit includes documents on preliminary considerations, ongoing procedures, project descriptions, and summaries.

The flyer covers the physical application of barcodes, ongoing support and preliminary considerations.

Technical Services Cost Studies, #125, June 1986

The lack of standardized methods for collecting comparable data appears to be limiting the number of libraries that have conducted cost studies. By developing staff skills in the use of analytical and quantitative methods, libraries can pursue the process of collecting and interpreting data, and develop performance measures that can serve as management tools. The kit includes questionnaires, outlines of management information systems for total library analysis, a breakdown of technical services activities into a menu of processing modules used for cost recovery, and analyses of converting card catalogs.

Automated Library Systems, #126, July-August 1986

Telephone interviews with members focused on the decision-making process behind automated systems. Pre-purchase or design decisions, responsibilities for system implementation and operation, and expectations for the future were explored. The flyer covers survey results, descriptions of the planning process and system implementation, as well as operational issues such as computer center relationships and statistics.

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Bibliographic Instruction, #121, February 1986

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SPEC Activities

Month	SPEC File Requests	Public Info Requests	Kits Sold	Other Pubs.	Subs.
January	19	66	149	122	351
February	19	183	122	254	378
March	22	99	143	170	412
April	18	58	143	169	419
May	13		180	125	424
June	16		161	98	428
July	9		121	165	429
Aug	9	46	112	136	433
September	13	60	92	71	432
October	15	71	213	52	434
November	7	47	193	123	434
December	9	50	223	104	449
TOTALS	169	680	1852	1589	

Automation Inventory

This was the third year of operation for the Automation Inventory of Research Libraries, and a number of important trends were identified. Between 1985 and 1986, there was a 22 percent increase in the percentage of ARL-member libraries using integrated online catalogs, a 19 percent increase in those reporting integrated local cataloging systems, and an 18 percent increase in the percentage of libraries with integrated acquisitions systems.

These and other trends identified in the 1986 Inventory are based on the responses of 113 ARL institutions (up from 92 in 1985) to an automation survey conducted by OMS. A new section for library comments, a more readable presentation of vendors, and additional counts and sorted listings of activities and status were included in this second annual compilation of information and data.

Automation Expenditures Project

The ARL/OMS Automation Expenditures Project continued for its second year, in collaboration with the Lister Hill Center of the National Library of Medicine. Automation expenditure information was collected on a special project basis from ARL members. Based on this information, an upcoming Occasional Paper on ARL Statistics for Planning and Forecasting will explore the use of ARL statistics over several decades as a planning and forecasting tool. The following trends were identified over 1985-1986:

—the total of all annual continuing costs per library has risen from approximately $464,000 to $523,000 per library in one year;

—the number of libraries able to report on local costs (personnel, supplies) has risen from 38 to 59 in one year providing evidence that libraries are beginning to track local expenses over and above contract and equipment purchases;

—the number of libraries reporting expenditures for integrated systems has risen from 31 to 53 in one year, providing evidence that the use of such systems is rapidly increasing.

SPEC Surveys

Exhibits	All members	70	Kit #120
Bibliographic Instruction	Targeted	25	Kit #121
End-User Instruction	Targeted	23	Kit #122
Microcomputer Software Policies	Targeted	105	Kit #123
Barcoding Collections	Targeted	88	Kit #124
Technical Services Cost Studies	All members	118	Kit #125
Automated Library Systems	Targeted	12	Kit #126
Interlibrary Loan	Targeted	32	Kit #127
Systems Office Organization	Targeted	26	Kit #128
Organization Charts	Targeted	86	Kit #129
Reporting Relationship of Director	On-demand/ Targeted	73	Document File
Automation Inventory	All members	102	Publication
Approval Plans	On-demand/ Targeted	8	Document File
Professional Positions	On-demand Targeted	22	Document File & Future Spec Kit
Closing Card Catalog	On-demand/ Targeted	25	Document File
Questionnaire to Evaluate Directors	On-demand/ Targeted	90	Document File
Cataloging Priorities and Languages	On-demand/ Targeted	34	Document File
Building Space	On-demand/ Targeted	31	Document File
Building Use	On-demand/ Targeted	74	Document File & Future SPEC Kit
Expenditure Categories for Membership Fees	On-demand/ Targeted	14	Document File
Bibliographic Access to U.S. Government Publications	On-Demand/ Targeted		Future Paper

The Office of Management Studies is committed to helping academic and research libraries meet the changing instructional and research needs of higher education through the sound management of their available resources. Central to that mission is the conviction that improving the performance of libraries requires strong individual leadership, effective management, and specialized training programs to develop staff competence.

In order to identify and develop skilled library staff and managerial talent, OMS established organization training and staff development programs that have served nearly 7,000 participants since their inception in 1973.

In 1986, OMS maintained the high level of activity achieved in training and staff development programs in 1985 and offered the full range of institutes and special focus workshops to the academic and research library community. In its second year of operation, the Analytical Skills Institute was improved and consolidated, achieving increased acceptance and higher levels of satisfaction.

As part of the OMS effort to extend the capabilities of staff to operate strategically in the face of ambiguities and changes occurring in academic and research libraries, a new program was offered, the Management Institute for Assistant/Associate Directors of ARL Libraries. This Institute was developed at membership request and patterned after the Management Institute for ARL Directors. The three topics studied in 1986 were strategic planning, organizational change, and the role and use of power and influence in academic and research libraries.

The Library Management Skills Institutes, also offered again in 1986, are designed to benefit individuals with administrative responsibilities in research libraries, library staff with substantial supervisory responsibility, and persons looking forward to careers in academic and research library management. Training programs are keyed to varying levels of knowledge and expertise, and they address areas of staff competence that are vital in dealing with issues facing contemporary libraries; issues such as human relations skills, analytical skills, collection analysis, preservation and public services.

The institutes' laboratory approach includes structured exercises, case studies, selected readings, experiential sessions modeled on daily library operations, and an OMS Study Guide that supports the training. Working with OMS staff, librarians:

—identify the skills needed to improved supervisory and managerial performance

—acquire an understanding of managerial concepts and practices

—examine personal values and beliefs to determine their impact on the organization

—discover how to apply what they learn

Basic Management Skills Institutes

These 3 ½ day institutes are geared to library professionals with some managerial, administrative or supervisory responsibilities, and to those interested in library management careers. Sessions focus on the role of academic library managers, and address specific issues such as motivation of staff, interpersonal behavior and skills, decision-making, effective use of groups, supervisory leadership and communication. Designed to highlight the individual's relationship to the library organization, these institutes give participants an opportunity to reflect on their current approach to managerial and supervisory responsibilities and to become acquainted with techniques associated with effective management.

1986 Institutes

Columbia	Sponsored	35
Brown	Sponsored	23
Colorado State	Sponsored	21
Nebraska	Sponsored	28
A.I.M.A./Sidney	Sponsored	29
Louisville	Public	19
Scottsdale	Public	39

21

Advanced Management Skills Institutes

These 5 ½ day programs are designed for those who hold senior management positions and those seeking proficiency in top-level executive responsibilities. Through simulation of a library organization, participants observe the effects of intervention on the system as a whole. The sessionsemphasize executive leadership, planning and goal-setting, building management teams, information requirements of executive decision-making, and organizational diagnosis and change. Participants receive a number of well-tested survey instruments which serve as the basis for a self-assessment and personal awareness profile. The results of these surveys assist in the process of connecting the workshop agenda to experiences in the work environment.

Advanced institutes are offered in various geographical locations several times each year. The following is a list of those held in 1986.

1986 Institutes

A.I.M.A./Sidney	Sponsored	25
A.I.M.A./Sidney	Sponsored	22
University of Florida	Sponsored	27
St. Louis	Public	14
Airlie	Public	21
Washington, D.C.	Public	11
Annapolis for AULS	Public	33

Library Analytical Skills Institutes

This 3 ½ day institute is designed for library professionals seeking to expand their problem-solving and project planning skills. The focus is on strengthening the skills needed to effectively observe, diagnose and initiate changes in library operations.

Several weeks before the institute, participants receive a workbook on statistical concepts and vocabulary. This advance preparation ensures a basic understanding of terms and ideas that will be used to discuss case studies during the institute. Participants have an opportunity to use the resources of an academic research library and simulate an examination of library operations. They choose from a number of projects that illustrate common library problems such as measuring materials availability, evaluating library staff work, and preparing a cost benefit analysis. Participants return to their home libraries prepared to evaluate operations, demonstrate accountability, make a case for financial support, measure user satisfaction, and carry out other such projects that are most valuable in meeting the demands faced by library managers today.

1986 Institutes

Emory	Sponsored	33
University of Florida	Sponsored	27
Montreal	Public	20
Baton Rouge	Public	18

Special Focus Workshops and Presentations

Solinet	Managing the Learning Process	12
California State University	Management Skills for Women Managers	32
Kent	Management of Change	37
ACRL	Introduction to Consulting Skills	16
Kentucky Library Association	Management Skills for Women Managers	80
University of Missouri	NCIP training	15
CARL/Montreal	NCIP/French speaking	14
Brooklyn College	Team-building	12
Solinet	Change and power	160
ALA/ACRL	Introduction to Consulting Skills	10
National Library of Scotland	NCIP/Conspectus Approach to Collection Analysis	25
University of Nebraska	Supervisory Staff	37
Solinet	Program Planning	16
National Conference on ONLINE Systems	Impact of Library Technology on Management	300
National Conference on ONLINE Systems	Automation Trends in Technology on Management	300
South Carolina Library Association	Managing the Change Process	105
MLA Mid-Atlantic. Chicago meeting	Selling Automation to Administrators	100
ACRL/Oklahoma Chapter	Strategic Planning for Public Service	40
American Theological Library Association	Collection Assessment	60
S.E. Maryland Library Association	Conflict Management	25
Canadian Association of Law Libraries	Collection Assessment Using the Conspectus	15
CARL/Atlantic Provinces	NCIP	25
Ontario Library Association	OMS Approach to User Services Self Studies	40

Special Focus Workshops

These short, one or two-day programs cover a single topic or two closely related topics selected by an individual library. They have proven to be most useful to libraries faced with new situations that affect a large portion of the staff and which require a clear understanding or organizational goals.

OMS designs the programs to meet the specific needs of the individual library. For example, workshops have been prepared on implementing an automated system, undertaking a new system of performance review, and establishing a new administrative structure. The programs provide a mixture of conceptual models and working techniques, and include self-assessment tools and case studies that relate those concepts to the academic library environment.

Other special workshop topics include time management, strategic planning, team building and group decisionmaking, program evaluation, time management, supervisory skills, conflict resolution, and using behavior pattern analysis as an organizational tool.

Consultation for In-House Programs

The OMS staff provides assistance and training materials to libraries interested in offering in-house staff training and development programs. Especially valuable to libraries unable to devote staff time and efforts to developing such programs, this consultative service creates and provides training materials oriented to the specific needs of the library. Outcomes range from detailed recommendations for change to improved awareness of complex issues facing academic libraries.

The library staff plays a major role in conducting the programs, often adapting commercially available materials and implementing self-administered tools. In many instances, the consulting services are provided by graduates from the OMS Consultant Training Program, a group of library professionals working in all aspects of library operations who have completed extensive training in program assessment and operation.

Consultant Trainees and Assignments

In 1986, 11 Consultant Training Program graduates participated in 20 self-study and training events with OMS staff at 16 libraries.

Primarily librarians from ARL-member libraries, they were among the 77 CTP graduates who completed an OMS Consultation Skills Workshop and a practicum between 1979 and 1983. Since graduating, they have worked with OMS staff members on library studies, research and publications, or training programs. They have designed study interventions, prepared organizational assessments, and participated in related workshops, institutes and conferences. Graduates also use the skills they acquired through the program to benefit their home institutions, and to serve as consultants for OMS on an occasional basis.

The following is a list of project category abbreviations:

Academic Library Development Program	ALDP
Analytical Skills Institute	ASI
Principal Consultant	C
Collection Analysis Project	CAP
Management Review and Analysis Project	MRAP
Management Skills Institute	MSI
Organizational Screening Program	OS
Practicum	P
Preservation Planning Program	PP
Planning Program for Small Academic Libraries	PPSAL
Public Services Project	PS
Research & Writing	R/W
Training program	T

Consultant Training Program Participants

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Alldredge, Noreen S. Director of Libraries Montana State University Bozeman, Montana 59719	1980	Univ. of Ill. Chicago Circle: CAP (P)
Bellefontaine, Arnold Executive Officer Office of the Assoc. Libr. for National Programs Library of Congress Washington, D.C. 20540	1981	Columbia, MD. MSI (T); Univ. Ctr.of GA. Stress Workshop. (T); Univ. of Chicago Supervisory Skills.(T); George Washington Univ. CAP (P)
Bennett, Annalea 14755 Ventura Building #1904 Sherman Oaks, CA 94941	1981	Brandeis Univ.:Tech Services Planning Study (P)
Berson, Bella Z. Associate University Librarian And Director Medical Library Box l603A Yale Station New Haven, CT 06520	1980	Consultation Skills Workshop (T); Univ. of CA. Public Services Workshop (T)
Bowman, Martha University Librarian University of Louisvile Louisville, KY 40208	1981	Howard University CAP (P)
Branin, Joseph Director, Humanities and Social Sciences Libraries University of Minnesota Minneapolis, MN 55455	1981	Miami Univ. ALDP (P) Nashville Tenn., Mobile, AL. MSI (T)
Bril, Patricia L. Collection Development Officer California State University Fullerton Library Fullerton, CA 92634	1982	Tucson, Ariz. MSI (T)
Chambers, Joan Director of Libraries Colorado State University Fort Collins, CO 80523	1981	Cal. State Univ., Sacramento ALDP (P)
Cottam, Keith Director of Libraries William Robertson Coe Library University of Wyoming University Station Laramie, WY 82071	1980	Ohio State Univ. & Columbia, MD MSI (T); Univ. of Houston: PS (P)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Cronin, Mary J. University Librarian O'Neill Library Boston College Chestnut Hill, MA 02167	1983	Chicago, ILL: MSI (T); OMS Occasional Paper (R/W)
Dillon, Howard W. Associate Director for Public Services The University of Chicago Chicago, IL 60637	1980	Ball State Univ.:MRAP (P) North Park College: PPSAL (C)
Dyson, Allan J. University Librarian University of California, Santa Cruz Santa Cruz, CA 95064	1983	
Euster, Joanne R. Director of Libraries San Francisco State University Library 1630 Holloway Ave. San Francisco, CA 94132	1980	OMS Occasional Paper (R/W); North Texas State Univ.: OS (P)
Foltin, Bela P.O. Box 151 Blacksburg, VA 24060	1983	
Hagyard, Alan E. Physical Science & Geology Librarian Yale University Library New Haven, CT 06517	1983	Boston, MA: Advanced MSI (T)
Haikalis, Peter D. Asst. Director, Readers Services San Francisco State University Library San Francisco, CA 94132	1982	Univ. of CA, Riverside: PS Services Univ. of MO., Columbia MSI (T)
Haka, Clifford H. Information Librarian Michigan State University East Lansing, MI 48824	1983	OMS Occasional Paper (R/W)
Hallblade, Shirley Assoc. Director Jean & Alexander Heard Lib. Vanderbilt University Box 155, Peabody College Nashville, TN 37203-5601	1982	Univ. of North Carolina:PS (P)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Hardesty, Larry Library Director Eckerd College St. Petersburg, FL 33733	1980	Lake Forest College: PPSAL (P)
Harris, Carolyn Head, Preservation Dept. Columbia University Libraries New York, NY 10027	1982	Boston, MA, MSI (T); Johns Hopkins Supervisory Skills Work shop(T); U. of MO and U. TN. PP (P)
Heath, Fred Milton University Librarian University of North Alabama Florence, AL 35630	1980	St. Olaf Coll.: PPSAL (P) Carleton College and Wittenberg College: PPSAL (C)
Hoffmann, Ellen Director of Libraries York University 4700 Keele St. Downsview, Ontario CANADA M3J 2R2	1982	Brown Univ.: PS (P)
Howard, Clinton Acquisitions Librarian University of Kansas Lawrence, Kansas 66045	1981	
Hubbard, Willis M. College Librarian Gettysburg College Gettysburg, PA 17325-1493	1981	Bloomsburg Univ. PPSAL (P)
James, Olive C. Special Consultant for Reference Services Library of Congress Washington, D.C. 20540	1983	
Jaynes, Phyllis E. Director of User Services Dartmouth College Library Hanover, NH 03755	1980	McGill Univ: CAP (P)
Jones, William G. Assistant University Librarian University of Illinois Chicago Circle Campus Box 8198 Chicago, IL 60680	1980	Hanover College: PPSAL (P); OMS Occasional Paper (R/W); Minn. Minn. MSI (T); St. Joseph's College: PPSAL (C)
Kennedy, Gail A. Technical Services University of Kentucky King Library Lexington, KY 40506	1983	SPEC Kit (R/W)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Kohl, David F. Asst. Director for Undergraduate Libraries University of Illinois at Urbana-Champaign Champaign, IL 61801	1983	Philadelphia, PA, MIS (T)
Kozlowski, Marianne Programmer, MCS Company Address in Question	1980	Temple Univ.: OS (P); Minn. Minn. MSI (T); St. Xavier College: PPSAL (C)
Kupersmith, John Asst. for Public Services Programs—Library University of Texas at Austin Austin, TX 78712	1983	
Leach, Ronald Dean of Libraries Cunningham Memorial Library Indiana State University Terre Haute, IN 47809	1981	Univ. of MI., Coping with Change Workshop (T); Ind. St. Univ., Ohio State Univ. MSI (T)
Leinbach, Philip E. University Librarian Tulane University Library New Orleans, LA 70118	1981	York Univ. Supervisory Skills Workshop (T)
Lockett, Barbara Rice Director of Libraries Folsom Library Rensselaer Polytechnic Institute Troy, NY 12180	1981	St. Univ. of NY, Stony Brook (P) and OH St. Univ.: PP (C)
Lowry, Charles Library Director Library Administration Box 19497 University of Texas at Arlington Arlington, TX 76013	1980	Transylvania College:PPSAL (P)
Mackey, Neosha Ann Head of Reference Duane G. Meyer Library Box 175 Southwest Missouri State University Springfield, MO 65804-0095	1980	Minneapolis, MN MSI (T)
Martell, Charles Associate University Librarian for Public Services California State University 2000 Jed Smith Drive Sacramento, CA 95819	1981	San Jose, CA, OS (P); Univ. of Pittsburgh MSI (T)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Martin, James R. Asst. Director for Public Services Florida State University Strozier Library—Rm. 105 Tallahassee, FL 32306	1983	
McCarthy, Connie K. Asst. University Librarian for Collections Gelman Library George Washington Univ. Washington, D.C. 20052	1982	Georgetown Univ.: CAP (P)
McClung, Patricia Assoc. Dir. of Prog. Coordination The Research Libraries Group, Inc. Jordan Quadrangle Stanford, CA 94305	1983	Univ. of Oregon MSI (T); AALS Workshop (T); Univ. of Oregon: PP (P)
McCool, Donna L. Asst. Director for Admin. Ser- vices Washington State University Library Pullman, WA 99164	1980	Univ. of British Columbia: CAP (P); SPEC Kit (R/W)
McDonald, David R. Asst. Director of Systems University Library University of Michigan Ann Arbor, MI 48109-1185	1982	Univ. of TX, Case Western Reserve Univ. MSI (T); San Diego, CA ASI (T) Montreal ASI (T) Baton Rouge ASI (T)
Miller, Arthur College Librarian Lake Forest College Lake Forest, IL 60045	1981	Gannon Univ. PPSAL (P); Alverno College, Lake Forest College PPSAL (C)
Miller, R. Bruce Asst. University Librarian Technical Services University of California, San Diego La Jolla, CA 92093	1982	Vanderbilt Univ.: CAP (P); San Diego, CA, ASI (T) Univ. of Florida ASI (T) SPEC Flyer/kit (R/W)
Mirsky, Phyllis S. Asst. University Librarian, Sciences University of California, San Diego La Jolla, CA 92093	1983	North American Collections Inventory Project (T)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Myers, Margaret Director, OLPR/ALA 50 East Huron Street Chicago, IL 60611	1982	Johns Hopkins Supervisory Skills Workshop (T)
Nye, Julie B. Library Systems Analyst Davis Library 080A UNC—Chapel Hill Chapel Hill, NC 27514	1983	Duke Univ: CAP (P) Coral Gables, Fla. MSI (T)
Parent, Roger H. Deputy Director, LAMA American Library Assn. 50 E. Huron Street Chicago, IL 60611	1980	Univ. of CA Public Services Workshop (T) San Diego, CA. MSI (T)
Peters, Paul E. Asst. University Librarian for Systems Columbia University Libraries 215M Butler Library New York, NY 10027	1982	Consultation Skills Workshop (T) Pittsburgh PA ASI (T) Emory ASI (T)
Peyton, Anne Assoc. Director, Capital Giving Dartmouth College Libraries Blunt Alumni Center Hanover, NH 03755	1980	DePaul Univ.: PPSAL (P); New Hampshire MSI (T); Mass. Inst. of Tech. MSI (T)
Phipps, Shelley Asst. University Librarian for Branch Services University of Arizona Main Library Tucson, AZ 85721	1981	Univ. of CO: CAP (P) HARLIC, Houston, TX; Univ. of Alberta MSI (T) Louisville MSI (T) Airlie MSI (T)
Query, Lance D. Director, Library Research, Analysis, and Personnel Northwestern University Evanston, IL 60201	1983	Center for Research Libraries: PP (P)
Racine, John D. Asst. Director For Technical Services 113 Ellis Library University of Missouri Columbia, MO 65201	1983	Colorado State Univ. PP (P) Iowa State Univ.: PP (C)
Randall, Ann K. Chief Librarian City College at CUNY 138th Street at Convent Ave. New York, NY 10031	1982	Temple Univ.: PS (P)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Reed, Grace M. ARMCO 703 Curtis Street Middletown, OH 20540	1980	Univ. of MD: CAP (P) Theological Lib. Assoc. MSI (T)
Reuland, Anne Information Services Librarian Vanderbilt University Nashville, TN 37240-0007	1983	Columbia, MD: MSI (T)
Richardson, Jeanne Collections Development Coordinator Hayden Library Arizona State University Tempe, AZ 85281	1983	Cornell Univ. CAP Planning (T)
Robison, Dennis E. University Librian James Madison University Harrisonburgh, VA 22807	1980	Earlham College: PPSAL (P)
Sampson, Karen L. Manager—Administration U.S. West Information Systems 6200 South Quebec Street Englewood, CO 80111	1982	Alberta, Canada MSI (T)
Scepanski, Jordan M. Director of Libraries California State University, Long Beach Univ. Library & Learning Resources 1250 Bellflower Blvd. Long Beach, CA 90840	1980	Univ. of Notre Dame: CAP (P) Univ. of Evansville:PPSAL (C) Nebraska MSI (T)
Schneider, D.W. Associate Director of the Library Louisiana State University Baton Rouge, LA 70803	1981	Univ. of Houston CAP (P)
Shapiro, Beth I. Asst. Director for Reader's Services Michigan State University Library East Lansing, MI 48824	1983	
Shaughnessy, Thomas Director University of Missouri Library Columbia, Missouri 65201	1981	Univ. of Tulsa ALDP (P)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Skivington, Kristen D. Department of Communication Michigan State University East Lansing, MI 48824-1212	1982	Columbia, MD. Advanced MSI (T)
Soete, George Asst. University Librarian for Humanities & Social Sciences University of California, San Diego La Jolla, CA 92093	1980	SPEC Flyer/Kit (R/W); Brigham Young Univ. CAP (P); Huntington College, Franklin College, Goshen College: PPSAL (C); Univ. of CA., Berkeley Public Services Workshop (T); Boulder, Colo., Columbia Univ., Tucson, Arizona, Univ. of Oregon MSI (T); NCIP Training, Univ. of Southern California (C) Scottsdale MSI (T); Colorado State MSI (T); Oregon State (CAP); Brown MSI (T)
Swanson, Patricia Asst. Director for Science Libraries The John Crerar Library of the University of Chicago 5730 South Ellis Chicago, IL 60637	1981	Univ. of MI CAP (P); Performance Appraisal, Northern Ill. Univ. (T); Consultation Skills Workshop (T); Univ. of Arizona Planning Retreat (T); Univ. of Pittsburgh Communication & Long Range Planning Workshop (T); University of Alberta, Tucson, Arizona MSI (T); Univ. of Chicago Organizational Skills for Beginning Libraries (T) Columbia MSI (T); Annapolis for AULS MSI (T)
Tanno, John W. Assoc. University Librarian for Planning and Dev. University of California Riverside, CA 92507	1982	University of Alberta: CAP (P)
Trochim, Mary Director Ithaca Community School of Music and Arts Ithaca, NY 14850	1981	Dillard Univ., Atlanta College of Art Small College Collection Assessment (P); Tougaloo College, Tuskegee Institute Sm. Coll. Collection Assessment (C) Cornell MSI (T)
von Wahlde, Barbara Director of Libraries University Libraries SUNY-Buffalo 432 Capen Hall Buffalo, NY 14260	1983	Northwestern Univ.: PP (P)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Walch, David Director of University Libraries California Polytechnic State Univ. San Louis Obispo, CA 93407	1981	Univ. of Arizona OS (P)
Wand, Pat (formerly Silvernail) Asst. University Librarian for Public Services University of Oregon Eugene, OR 97403-1299	1983	San Diego, CA. MSI (T)
Wells, H. Lea Library Consultant 6714 E. Los Arcos St. Long Beach, CA 90815	1981	SPEC Flyer/Kit (R/W); Toronto MSI (T) Scottsdale MSI (T)
Whildin, Sara Lou Campus Head Librarian Pennsylvania State University Delaware County Campus 25 Yearsley Mill Road Media, PA 19063	1980	Franklin & Marshall Coll. CAP (P)
Yocum, Patricia B. Head, Natural Science Library 3140 Nat. Science Bldg. University of Michigan Ann Arbor, MI 48109	1983	Ind., NCIP (P); Mankato State Univ. Collection Description (T); MI State Univ. Collection Description (C)
Zeidberg, David S. Head of Special Collections UCLA Library 405 Hilgard Ave. Los Angeles, CA 90024	1982	Catholic Univ. of America CAP (P); SPEC Kit #100 Collection Security (R/W)

In collaboration with the ARL Committee on Management of Research Libraries, OMS prepares a detailed proposal of activities for the upcoming year. Drawing from that report, OMS plans to pursue the following activities in 1987.

OMS expects to maintain the current level of effort in the self-study, information clearinghouse and training programs. In addition, a separately funded project will be operated as part of the research and development program: The Mellon/North American Collections Inventory Project Phase III.

Research and Development

Priorities for 1987 in this area include separately-funded projects, efforts to start new projects and OMS assistance to research projects operated by other agencies and libraries. A primary R&D goal is the completion of Phase III of the North American Research Collections Inventory Project (NCIP). Activities will include providing training to participant libraries, developing assessment tools, and developing educational materials for public service staff and library users.

A number of new programs are in the planning stages. These include:

1. A Third Institute on Research Libraries—Building on the success of the first two, this institute would be designed to enrich library educators' understanding of research library issues and to study the forces that characterize and influence the current and future state of research libraries.

2. Preservation Administrator Training—OMS has been invited by the National Endowment for the Humanities to submit a proposal to establish a much-needed training program for preservation administrators. Funding received under such a program would be distributed to library schools as well as ARL libraries.

3. Managing Technology Transition in Research Libraries—This program would address the issues related to where libraries stand now regarding the use of networks; shifting automated activities back to local settings; and integrating functions.

4. Management Information Service for Research Libraries—A process would be established to gather data on operations and apply that information in an analytical fashion to management decision-making. The service would provide assistance in targeting issues, designing data-gathering methodologies, analyzing information, and determining appropriate action.

5. Management Literature Review Service—Under consideration is separately-published literature review that would include book reviews. Four librarians have been recruited to produce a sample issue.

Organizational Training and Staff Development

Increasing the effectiveness of the training and development programs will be the focus of this area in 1987. Research on adult education shows that three components are critical to successful learning: motivation, association,and support. Motivation to learn can be amplified by productively exploiting the personal desire for growth. In order to command attention and credibility, programs must mirror organizational reality, and organizations must provide a supportive environment for new behaviors to take hold after a program has been completed.

Training staff will be investigating and developing materials which support and enhance the adult learning process. The key element will be strengthening the links between the participants' experiences in the workshops and their daily organizational settings. Guidelines and documentation will be produced to assist libraries in providing guidance to staff for getting the most out of the workshops they attend.

"Managing the Learning Process," a new Institute to be offered for the first time in 1987, will also address the need for more effective training programs. It is designed to assist academic and research libraries expand their internal capabilities to provide developmental activities for their staff. Participants in this workshop will study contemporary adult learning theories and practice training skills and techniques in laboratory and field study settings.

Current programs will also be maintained, including six major public institutes and six sponsored institutes. Basic Management Skills Institutes are slated for Washington, D.C., May 19-22, and Chicago, October 13-16. One Advanced Management Skills Institute is scheduled for Philadelphia, November 8-13, and one Mangement Skills Institute for AULs is planned for Asilomar, California, June 7-20. Two Analytical Skills Institutes will be held; one in Syracuse, June 2-5, and one in Honolulu, December 1-4.

OMS will also be conducting up to 8 additional Management Skills Institutes on a sponsored basis. These include Management Institutes for Depository Libraries in October and a program at the University of Texas in March.

Up to 15 Special Focus Workshops will be held in 1987, and a Management Institute for ARL Directors will be held September 16-19. In addition, OMS will conduct "Managing the Learning Process" in August.

Academic Library Program

OMS expects to start up to 10 new library studies in the areas of collection, preservation, public service and leadership development in 1987. The Office will continue to provide self-study resources and consultation assistance to individual libraries. Self-study resources will be maintained in the following eight areas:

—Management Review and Analysis

—Academic Library Development

—Collection Analysis

—Planning Program for Small Academic Libraries

—Organizational Screening

—Preservation Program

—Public Services Study

—Leadership Development

Information Exchange and Publications Program

The SPEC clearinghouse will focus on electronic alternatives and enhancements to traditional print-oriented information services. It will refine and operate its heavily-used on-demand survey services and attempt to develop member interest in database services, where appropriate. The clearinghouse will also continue to expand its use of electronic mail for surveys and the distribution of information. Refinement of the Automation Inventory and development of a variety of formats for occasional papers is also planned.

The Systems and Procedures Exchange Center will issue a maximum of six SPEC surveys in 1987, and maintain the SPEC Index with quarterly updates. Ten SPEC kits will be published, as will a selection of position papers, manuals and resource notebooks.

OMS will also develop microcomputer-based information databases for members in conjunction with on-demand surveys and QUICK-SPECs.

The Automation Expenditure Project will continue, collecting and publishing simplified 1987 data. In addition, a data-sharing test will be conducted with EDUCOM/Tufts. Initially, 12 libraries will receive assistance from the OMS Systems and Procedures Exchange Center in a project that will support college and university planning and management. The main goal is to aid libraries in identifying the most useful trend indicators, peer comparisons and other management information that can be derived from a shared database of detailed library and other relevant information on institutional characteristics.

OMS will also work with Association of Research Libraries Committees on collection development, bibliographic control, preservation and statistics projects.

36

Duane E. Webster

Mr. Webster received his M.A.L.S. from the University of Michigan in 1964 and worked for the University of Michigan Library, the Rochester Public Library, General Dynamics Corporation Library, and the NASA Electronics Research Center before joining the Association of Research Libraries in 1970 to establish the Office of Management Studies.

As Deputy Executive Director, he assists in the planning, development and operation of programs for ARL, an organization which represents the interests of the 118 largest research libraries in the United States and Canada. As Director of the Office of Management Studies, he works to strengthen the management capacity of these libraries. During his tenure at ARL, Mr. Webster has designed study processes to assess public services, management systems, collections and preservation programs in large research libraries. In addition, he has created planning and development studies for small and mid-sized academic libraries. He has served as a consultant to over 80 libraries, provided management training to over 5000 librarians, and has written widely on the topics of organizatonal development and performance improvement for libraries.

Jeffrey J. Gardner

Associate Director of OMS. Mr. Gardner received his B.S. from Tufts University and his M.L.S. at Simmons College. He has worked for public, special and university libraries including M.I.T. where he was director of the Project Intrex Model Library Program from 1967 to 1973. He then joined the Office of Management Studies as Management Research Specialist, served as an Associate since 1978, and as Associate Director since 1985.

Mr. Gardner develops and manages special programs for academic and research libraries. He is responsible for supervising and training in the areas of collection development and management, and he operates the Collection Analysis Project which he designed for OMS. In addition, Mr. Gardner manages the North American Collections Inventory Project (NCIP), works with academic libraries on organizational development projects, and supervises self-studies on public services and collection management.

Susan Jurow

Susan Jurow, Program Officer for Training, assesses library training needs, designs training resources and services, and conducts training and staff development programs. These include the Organizational Training and Staff Development Program, management and operational workshops as well as specialized institutes, seminars, and consultation for in-house programs. She monitors emerging professional and management developments in order to design programs that meet the unique needs of academic and research libraries.

Prior to joining OMS, Ms. Jurow was Assistant to the Director of the Northern Regional Library Facility, University of California, Richmond Field Station. She has also served as acting head of the Reference Department, M.D. Anderson Library, University of Houston; business reference librarian and coordinator of Computerized Information Retrieval Services at the University of Houston Library; and Head of the Current Periodicals and Microtexts Division at Stanford University's Green Library. She received her B.A. from Stanford University and her M.L.S. from Rutgers University.

Maxine K. Sitts

Ms. Sitts joined the Office of Management Studies in 1977 to develop and manage information sharing, clearinghouse, survey and publication services for member organizations and other academic libraries. As Information Services Specialist, she also develops new member services; administers grant projects; produces a monthly publication series for academic library administrators; and designs marketing support for publications and training programs.

Formerly a journalist in New York City, Ms. Sitts joined the ERIC Clearinghouse on Information Resources at Stanford University as Publication Director in 1971. She was elected President of the Washington Education Press Association in 1982-83, and currently chairs the Intellectual Freedom Committee of the Washington, D.C. Library Association. She is a magna cum laude graduate of the State University of New York, with a B.A. in English, and has done graduate work in English and journalism at Wagner College, Staten Island.

Karen A. Welter

Ms. Welter joined OMS in 1985 to work on publication and staff development programs. As Editorial Assistant, she coordinates the production of a monthly publication series; designed and edits the North American Collections Inventory Project newsletter; provides graphic design services for the office; and produces special publications.

As OMS Meeting Planner, Ms. Welter also administers the scheduling and technical aspects of training programs, including facility arrangements, participant accommodations, preparation of program materials, and billing. She received a B.S. in Journalism from the University of Illinois, Champaign-Urbana.

Marianne Seales

Marianne Seales joined the OMS staff in 1983 and serves as Office Manager, providing administrative and operational support. She assists the professional staff in scheduling, producing and maintaining office services and resources; serves as administrative assistant for the Deputy Executive Director; and assists the Training Program Specialist. Ms. Seales responsibilities also include arranging meeting space, housing, schedules, and travel; and preparing quarterly and project progress reports.

Prior to joining OMS, Ms. Seales served as Administrative Assistant to the Membership Development Coordinator for the National Association of Social Workers. She received a B.S. in Sociology from Tennessee State University in 1981, and has completed a special training program in office management.

Jutta Reed-Scott

Since 1983, Jutta Reed-Scott has served as Collection Development Specialist and Project Coordinator for OMS. She is a principal investigator for the North American Collections Inventory Project, developing technical documentation, providing training, and coordinating collection evaluations. Ms. Reed-Scott also manages preservation planning projects and operates the North American Program for Coordinated Retrospective Conversion.

Prior to her work at OMS, Ms. Reed-Scott served as Director of Collection Development and Bibliographic Control at Dartmouth College Library; as Collections Development Librarian at Massachusetts Institute of Technology; Associate Humanities Librarian at M.I.T., and as head of the Reference Department of George Washington University. She received a B.A. in history from the University of Maryland, and an M.A. in Library Science from the School of Library and Information Service, University of Maryland.

38

Academic Library Program Participants: 1973-1986

An asterisk signifies non-ARL members; capital letters indicate on-going projects.

The Management Review and Analysis Program:

*Ball State University
Boston University
University of California, Los Angeles
Case Western Reserve University
University of Connecticut
Indiana University
Johns Hopkins University
University of Kentucky
*Mankato State University
University of Maryland
University of Massachusetts
National Oceanic and Atmospheric Administration
Pennsylvania State University
University of Rochester
Rutgers University
Smithsonian Institution
*Southern Illinois University
University of Tennessee
University of Toronto
University of Utah
University of Washington
Washington State University

Academic Library Development Program:

BLOOMSBURG UNIVERSITY
*California State University
*Drew University University of Miami
*NEW MEXICO STATE UNIVERSITY
*University of North Carolina
*Northeastern University
*University of the Pacific
*Seattle University
*Southeast Missouri State University
UNIVERSITY OF CALIFORNIA/ IRVINE
University of Southern California
*University of Tulsa
*University of Wisconsin

Organizational Screening:

*Brandeis University
Dartmouth College
Johns Hopkins University
National Library of Canada
*North Texas State University
*Northeastern University
*San Francisco State University
*San Jose State University
Syracuse University
Temple University

Planning Program For Small Academic Libraries:

*Bloomsbury University
*Butler University
*Carlton College
*DePauw University
*Earlham College
*University of Evansville
*Franklin College
*Gannon University
*Goshen College
*Hanover College
*Hope College
*Huntington College
*Illinois Wesleyan
*Lake Forest College
*Manchester College
*North Park College
*Saint Olaf College
*Saint Joseph's College
*Saint Mary's College
*Saint Xavier College
Taylor University
*Transylvania University
*Valparaiso University
*Wittenburg University

Public Services Study:

BOSTON UNIVERSITY
Brown University
University of California, Berkeley
UNIVERSITY OF CALIFORNIA, SANTA BARBARA
Columbia University
DARTMOUTH COLLEGE
University of Houston
MCGILL UNIVERSITY
Michigan State University
Newberry Library
University of North Carolina
Temple University
YORK UNIVERSITY

Preservation Planning Program:

Center for Research Libraries
Colorado State University
Dartmouth College
Iowa State University
University of Missouri
National Library of Medicine
Northwestern University
Ohio State University
PITTSBURGH UNIVERSITY
University of Oregon
Smithsonian Institution
State University of New York, Stony Brook
University of Pittsburgh University of Tennessee
University of Virginia
University of Washington
UNIVERSITY OF WISCONSIN

Collection Analysis Project:

University of Alberta
Arizona State University
Brigham Young University
University of British Columbia
University of California, Berkeley
University of California, San Diego
Case Western Reserve University
*Catholic University
University of Colorado
Cornell University
*University of the District of Columbia
Duke University
*Franklin & Marshall College
*George Washington University
Georgetown University
*Georgetown Law Library
University of Houston
*Howard University
*University of Illinois, Chicago
University of Illinois, Urbana
University of Maryland
Massachusetts Institute of Technology
McGill University
University of Michigan
University of Notre Dame
OREGON STATE UNIVERSITY
RUTGERS UNIVERSITY
Vanderbilt University
*Widener University
*University of Wyoming

Leadership Development Program:

Established in 1986, this is an exercise in strategic planning geared to senior management staff of large research libraries. It is an opportunity to examine options for the future development and to consider making changes. During a three and one half day retreat, participants consider libraryoptions and strategies; evaluate ways to deliver services more effectively given available resources; and discuss possible adjustments in service philosophy and staff values. To date, the program has only been offered to members of the Association of Research Libraries.

OHIO STATE UNIVERSITY
STATE UNIVERSITY OF NEW YORK, BUFFALO
UNIVERSITY OF SOUTHERN CALIFORNIA
YALE UNIVERSITY

40

Publications, Presentations & Articles

Articles by OMS Staff:

National Collections Inventory Project: A Brief Description. Kent, Allen, ed., *Encyclopedia of Library and Information Science*, vol. 41, supplement 6. Marcel Dekker (N.Y.) 1987

The Development of a Computerized Member Service, by Maxine Sitts. *Proceedings of the Eighth Annual Meeting of the Society for Scholarly Publishing*, May 28030, 1986; pp. 51-54.

Preservation Issues in Technical Services: Discoveries of PPP Participants: RTSD *Newsletter*, Volume 11, Number 3, 1986; pp. 25-27.

Presentations by OMS Staff:

The Impact of Library Technology on Management: Duane Webster, at the Conference On Integrated Online Library Systems, September 23, 1986.

Models and Trends in Integrated Online Library Systems in Research Libraries: Maxine Sitts, at the Conference On Integrated Online Library Systems, September 23, 1986.

Scenarios for Assessing Future Organization and Programmatic Needs in Academic Libraries: Susan Jurow and Duane Webster, at the American Library Association Meeting, June, 1986.

The Development of Acquisition and Circulation Policies for Microcomputer Software in Academic Libraries: Maxine Sitts and Richard Nollan, at the American Library Association Meeting, June, 1986.

The North American Collections Inventory Project: A Cooperative Program for the Development of an Inventory of Research Library Collections in Canada and the United States: Jeffrey Gardner, Jutta Reed-Scott, and Mary Jane Starr, at the American Library Association Meeting, June, 1986.

OMS Publications

OMS Occasional Paper Series

Substantive papers published on an occasional basis addressing a particular trend or issue of library management.

*OP11 Flower, Kenneth E. "Academic Libraries On the Periphery: How Telecommunications Information Policy is Determined in Universities." April 1986. 43pp. ED 270 105.

OP10 Haka, Clifford H. and Nancy Stevens. "A Guidebook for Shelf Inventory Procedures in Academic Libraries." July 1985. 24pp. ED 260 716.

OP09 Cronin, Mary J. "Performance Measurement for Public Services in Academic and Research Libraries." February 1985. 36pps. ED 254 256.

OP08 Veaner, Allen B. "The Assistant/Associate Director Position in ARL Libraries." July 1984. 54pp. ED 232 657.

OP07 Vasi, John. "Budget Allocation Systems for Research Libraries." January 1983. 39pp.

OP06 Euster, Joanne R. "Changing Patterns in Internal Communication in Large Academic Libraries." July 1981. 21 pp. ED 207 602.

OP05 Jones, William G. "Salary Compensation Systems for Librarians: A Study of Ten Members of the Association of Research Libraries." May 1981. 24pp. ED 214 542.

OP04 Wax, David M. "A Handbook for the Introduction of On-Line Bibliographic Search Services into Academic Libraries." June 1976. 62pp.

OP02 Webster, Duane E. "Library Policies: Analysis, Formulation and Use in Academic Institutions." November 1972. 40pp.

OP01 Webster, Duane E. "Planning Aids for the University Library Director." December 1971. 27pp. ED 061 949.

Resource Notebooks

Tools to assist academic libraries in analyzing organizational problems and determining ways to resolve concerns.

RN03 Rosenberg, Jane E., Sullivan, Maureen. "Resource Notebook on Staff Development" June 1983. 309pp. ED 243 495.

RN02 Gardner, Jeffrey J. "Resource Notebook on Planning" February 1979. 155pp. ED 191 476.

RN01 Webster, Duane E. "Resource Notebook on Organization" January 1979. 147pp. ED 191 475.

Self-Study Manuals

Most self-study manuals are available only to libraries that are conducting a self-study with an OMS consultant. However, two manuals are available as separate publications.

*(SS01 AND SS02 AVAILABLE AS A SET)
SS01 Darling, Pamela W. and Webster, Duane E. "Preservation Planning Program: An Assisted Self-Study Manual for Libraries." NEW 1987 EDITION. 156pp.

*SS02 Wesley Boomgaarden. "Preservation Planning Program Resource Notebook." NEW 1987 EDITION. 700pp.

SS03 Trochim, Mary Kane. "Measuring the Book Circulation Use of a Small Academic Library Collection: A Manual." ISBN 0-918006-50-3. 1985. 73pp.

Final Reports of OMS Studies

Reports prepared by libraries conducting an OMS self-study project.

Management Review and Analysis Program Reports
MP20 Southern Illinois. April 1979. 93pp.
MP19 National Oceanic Atmospheric Admin.. Nov. 1977. 69pp.
MP18 UCLA. Feb. 1977. 138pp.
MP17 Johns Hopkins University. Sept. 1976. 131pp.
MP16 University of Massachusetts. July 1976. 81pp.
MP15 University of Toronto. June 1976. 384pp.
MP14 University of Kentucky. June 1976. 259pp.
MP13 Indiana Univ.. Jan. 1976. 122pp.
MP12 University of Utah. Nov. 1975. 207pp.
MP11 Pennsylvania State University. Sept. 1975. 264pp.
MP10 University of Connecticut. 1975. 95pp.
MP09 Washington State University. Dec. 1974. 127pp.
MP08 University of Maryland. Sept. 1974. 258pp.
MP07 University of Rochester. July 1974. 325pp.
MP06 Smithsonian Institution. Jan. 1974. 143pp.
MP05 Rutgers Univ.. 1974. 190pp.
MP04 Boston University. 1974. 165pp.
MP03 University of Washington. Nov. 1973. 174pp.
MP02 University of Tennessee. May 1973. 101pp.
MP01 Purdue University. 1973. 202pp.

Please send all requests for UCLA Report to: Library Admin. Office. 11324 University Research Library. 405 Hilgard Ave.. University of California. Los Angeles. California. 90024.

Planning Study
PS01 University of Arizona. Science-Engineering Library. Final Report. 1982-83 Planning Study. 1983. 248pp. (12 appendices).

Collection Analysis Project Reports

CP01 Arizona State University Library Final Report. 1978. 148pp.

CP02 Brigham Young University Library Final Report. 1979. 231pp.

CP03 Univ. Calif./Berkeley. General Lib. Final Report. 1978. 85pp.
CP04 Task Force Reports: Resource Sharing. 41pp.
CP05 Collection Evaluation. 31pp.
CP06 Communication. 24pp.
CP07 Allocation. 83pp.
CP08 Organization & Staffing. 24pp.
CP09 Preservation. 45pp.

CP10 University of California/San Diego Final Report. 1979. 404pp.

CP11 Case Western Reserve Univ. Libraries Final Report. 1980. 70pp.

CP12 Duke University Final Report. August 1984. ED 250 001. 89pp.
CP13 Task Force Reports: Organization & Staffing. 43pp.
CP14 Allocation of Materials Funds. 40pp.
CP15 Assessment. 68pp.
CP16 Collection Policies. 17pp.

CP17 Franklin & Marshall College Final Report. 1980. 15pp.

CP18 George Washington University Library Final Report. 1981. 115pp.

CP19 Univ. of Illinois at Chicago Circle Final Report. 1982. 101pp.

CP20 Univ. of Illinois at Urbana–Champaign Final Report. 1981. 71pp.
CP21 Task Force Reports: Allocation. 113pp.
CP22 Evaluation. 70pp.
CP23 Preservation. 182pp.
CP24 Resource Sharing. 64pp.
CP25 Selection of Library Materials. 107pp.

CP26 Massachusetts Institute of Technology Final Report. 1978. 89pp.
CP27 Task Force Reports: Organization & Staffing. 29pp.
CP28 Budget Allocation. 17pp.
CP29 Preservation. 63pp.
CP30 Collection Effectiveness. 89pp.
CP31 Resource Sharing. 98pp.

CP32 McGill University Final Report. 1982. 7 pp.

CP33 University of Michigan Executive Summary. 1983. ED 243 493. 20pp.
CP34 Task Force Reports: Allocation. 49pp.
CP35 Collection Assessment. 46pp.
CP36 New Needs and Possibilities Phase I-II. 77 pp.
CP37 Organization. 30pp.
CP38 Preservation. 25pp.
CP39 Resource Sharing. 43pp.

CP40 University of Notre Dame Libraries Final Report. 1981. 33pp.
CP41 Task Force Reports: Resource Sharing. 46pp.
CP42 Collection Assessment. 80pp.
CP43 Budget Allocation. 22pp.
CP44 Collection Development. 45pp.
CP45 Preservation. 48pp.

CP46 Widener University (Wolfgram Library) Final Report. 1984. ED 243 494.
CP47 Task Force Reports: Materials Fund Allocation. 22pp.
CP48 Organization and Selection. 23pp.
CP49 Resource Sharing. 24pp.
CP50 Collection Assessment. 46pp.

CP51 Reports of Implementation and Progress Reviews. (Arizona State, Brigham Young, M.I.T.). 40pp.

Academic Library Development Program Reports

AL01 University of North Carolina At Charlotte. ALDP Report. 1976. 167pp.
AL02 Drew University. ALDP Report. 1978. 220pp.
AL03 University of Wisconsin-Parkside. ALDP Report. 1978. 186pp.
AL04 Seattle University. ALDP Report. 1979. 254pp.
AL05 Southeast Missouri State University Report. 1983. 304pp.
AL06 University of Miami Report. 1983. 225pp.. ED 245 678.
AL07 University of Tulsa ALDP Report. 1983. 115pp.

Technical Services Reorganization

TS01 Ohio State University Library. 1982. 97pp.

Preservation Planning Program Reports

PP01 Dartmouth College. Preservation Report. 1981. 25pp. ED 217 837

PP02 University of Virginia. Preservation Planning Project Report. 1981. 58pp. ED 217 838

PP03 University of Washington. Final Report of the Preservation Project Study Team. 1981. 38pp.

PP04 State University of New York at Stony Brook. Preservation Planning Program Study Report. 1985. 35pp. ED 267 809.

PP05 National Library of Medicine. Preservation of the Biomedical Literature: A Plan for the National Library of Medicine. 1985. 55pp. plus appendices. ED 265 879.

PP06 Colorado State University. A Preservation Program for the Colorado State University Libraries. 1985. 19pp. ED 267 808

*PP07 Smithsonian Institution Libraries. SIL Preservation Planning Program. 1986. 50pp. plus appendices.

*PP08 University of Tennessee. Knoxville Library. Preservation Planning Program Library Final Report. 1986. 28 pages.

*PP09 Northwestern University. Final Report of the Preservation Planning Program Study Team. Northwestern University Library. 1986. 46pp.

*PP10 The Center for Research Libraries. Final Report of the Preservation Planning Program Study Team. Center for Research Libraries. 1986. 38pp.

*PP11 University of Oregon. Preservation Program for the University of Oregon Library. The Final Report of the Preservation Planning Program. 1986. 44pp.

*PP12 University of Missouri. Preservation at the University of Missouri—Columbia Libraries. A Report Prepared for the Director of Libraries. 1986. 56pp.

*PP13 Ohio State University. Preserving The Ohio State University Libraries' Collections: The OSUL Preservation Planning Program. 1986. 74pp. plus appendices.

Public Services Study Reports

PSS1 Brown University. 1984. 62pp. ED 253 244.
PSS2 University of California, Riverside. 1984. 59pp. ED 245 698.
PSS3 Columbia University. 1984. 84pp. ED 255 219.
PSS4 Michigan State University. 1983. 126pp. ED 244 635.
PSS5 Newberry Library. 1984. 35pp. ED 250 006.
PSS6 University of North Carolina at Chapel Hill. 40pp.
PSS7 Temple University. 1984. 116pp. ED 253 253.
PSS8 University of Houston. 1981. 45pp.
*PSS9 University of California, Santa Barbara. 1986. 53pp.

Public Services Research Reports

PSR1 University of Arizona. Assessing the Instructional Needs of Students in a Selected Scientific Discipline at the Univ. of Arizona. 1985. 140 pp. ED 255 225.

PSR2 Cornell University. Appropriate Public Services for Agricultural Research Faculty. Final Report. 1985. 54pp. ED 255 220.

PSR3 Univ. of Illinois at Urbana-Champaign. Invisible User: User Needs Assessment for Public Services. Final Report. 1985. 68pp. ED 255 227.

PSR4 Michigan State University. Non-Users of the MSU Libraries: An Assessment of Characteristics, Perceptions, and Needs at Michigan State University. 1985. 40pp. ED 255 221.

PSR5 New York University. A Study of an Online Catalog from a Public Services Perspective. Final Report. 1985. 44pp. ED 254 249.

PSR6 Pennsylvania State University. The Effect of An Instruction Program on Online Catalog Users. Final Report. 1985. 44pp. ED 255 223.

PSR7 Preliminary Reports from Public Services Research Projects. 72pp. 1985. ED 249 991

PSR8 Texas A&M University. A Comparison of Two End User Operated Search Systems. Final Report. 1985. 54pp. ED 255 224.

ARL Management Supplements

A series of articles providing an in-depth view of topics covered in SPEC Kits.

MS51 "Library Use Instruction in Academic/Research Libraries." 1977. 6pp.

MS41 Cottam, Keith M. "Professional Specialists in Academic Libraries." 1976. 6pp.

MS22 Wax, David; Morrison, R.D., Jr.; and Gardner, Jeffrey J. "The Delivery of Computer-Based Bibliographic Search Services by Academic and Research Libraries." 1974. 6pp.

MS21 Dionne, Richard J. "Review of the Formulation and Use of Objectives in Academic and Research Libraries." 1974. 4pp.

MS14 Gardner, Jeffrey J., ed. "Review of Management Training Activities in Academic and Research Libraries." 1973. 4pp.

MS11 Frankie, Suzanne and Webster, Duane E., eds. "Review of Planning Activities in Academic and Research Libraries." 1972. 4pp.

Other OMS Publications

Results of studies, conferences, and special projects

*PB11 Busch, B.J. "Integration of Public and Technical Services Functions." Visiting Librarian Paper. November 1986. 25pp.

*PB10 Sitts, Maxine K., ed. "The Automation Inventory of Research Libraries, 1986." September 1986. 160pp.

PB07 Sitts, Maxine K., ed. "The Automation Inventory of Research Libraries." August 1985. 80pp. ED 261 676.

*PB06 "Subject Index to SPEC Kits." Index to kits and flyers. 1987.

PB03 The Economics and Financial Management of Research Libraries: A Report on an Exploratory Meeting, Sponsored by the Association of Research Libraries and the Research Libraries Group, Inc., October 14, 1981, Washington, D.C.

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SPEC	103,272
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National Collection Inventory III	83,203
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